Integrating Planned Giving Into Your Campaign/Major Gifts Program

Presented by:
Brian M. Sagrestano, JD, CFRE

January 28, 2015

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The Association of Fundraising Professionals
WEB/AUDIOCONFERENCE 2014
January 28, 2015
Brian M. Sagrestano, JD, CFRE

**Integrating Planned Giving Into Your Campaign/Major Gifts Program**

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<th>NAME:</th>
<th>EMAIL ADDRESS:</th>
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</table>
Brian M. Sagrestano, JD, CFRE

Brian M. Sagrestano, JD, CFRE is the President and CEO of Gift Planning Development, LLC, as well as a partner in Constellation Advancement. His Planned Giving Essentials and Planned Giving in a Box® programs have made gift planning accessible to the full-range of charities for the first time. He co-authored with Robert E. Wahlers, CFRE the award-winning, *Philanthropic Planning Companion: The Fundraisers’ and Professional Advisors’ Guide to Charitable Gift Planning* (Wiley 2012). Later this year, Brian and Robert will release *Getting Started in Charitable Gift Planning* and the accompanying *Resource Book* through Charity Channel Press.

Brian is a sought after speaker and presenter at the AFP International Conference on Fundraising and a regular contributor to Advancing Philanthropy.
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President & CEO
GIFT PLANNING DEVELOPMENT, LLC

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Introduction

• Emergence of Donor-Centered “Philanthropic Planning”
• Understanding Generational Cohorts
• How Changing Generational Cohorts Led to the Need for Philanthropic Planning
• How to Use Philanthropic Planning to Integrate Annual and Planned Giving Into Capital Campaigns and Major Gifts
Defining Donor-Centered Philanthropic Planning

• Emerging Model for Working with Philanthropists
• Asks What the Philanthropist Needs to Accomplish For:
  • Self
  • Family
  • Future
  • Charities Believe In/Legacies Want to Create
• Integrates Those Goals into Tax, Estate and Financial Planning
Generational Cohorts

- Identifying Cohorts
- Defining Moments
- Shared Values
- Generalizations
- Traditionalists (Born Pre-1946)
- New Philanthropists (Born 1946-Present)
<table>
<thead>
<tr>
<th>Generation Name</th>
<th>Birth Years</th>
</tr>
</thead>
<tbody>
<tr>
<td>Depression</td>
<td>1912-1921</td>
</tr>
<tr>
<td>World War II</td>
<td>1922-1927</td>
</tr>
<tr>
<td>Post-War</td>
<td>1928-1945</td>
</tr>
<tr>
<td>Leading Boomers</td>
<td>1946-1954</td>
</tr>
<tr>
<td>Trailing Boomers</td>
<td>1955-1964</td>
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<tr>
<td>Generation X</td>
<td>1965-1976</td>
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<tr>
<td>Millennials</td>
<td>1977-1984?</td>
</tr>
<tr>
<td>Great Recession/Boomerang</td>
<td>1985-?</td>
</tr>
</tbody>
</table>
Depression
1912-1921
JOBLESS MEN
KEEP GOING
WE CAN'T TAKE CARE OF OUR OWN
CHAMBER OF COMMERCE
### Depression Cohort (1912-1921)

<table>
<thead>
<tr>
<th>Defining Moment:</th>
<th>Shared Values:</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Great Depression</td>
<td>- Practicality</td>
</tr>
<tr>
<td></td>
<td>- Savings</td>
</tr>
<tr>
<td></td>
<td>- Safety/security</td>
</tr>
<tr>
<td></td>
<td>- Friends/family</td>
</tr>
<tr>
<td></td>
<td>- Trust for charities</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Best Approaches:</th>
<th>Marketing Tips:</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Bequests</td>
<td>- Simple/presented in a straightforward manner</td>
</tr>
<tr>
<td>- Unrestricted endowment</td>
<td>- Use visuals and other cues</td>
</tr>
<tr>
<td>- Help the needy when tough times arrive</td>
<td>- Printed/face to face</td>
</tr>
<tr>
<td>- Secure our future</td>
<td>- No reverse type</td>
</tr>
</tbody>
</table>
World War II
1922-1927
We Can Do It!
## World War II (1922-1927)

<table>
<thead>
<tr>
<th>Defining Moment:</th>
<th>Shared Values:</th>
</tr>
</thead>
<tbody>
<tr>
<td>World War II</td>
<td>Patriotic</td>
</tr>
<tr>
<td></td>
<td>Respect for authority</td>
</tr>
<tr>
<td></td>
<td>Romantic</td>
</tr>
<tr>
<td></td>
<td>Self-reliant</td>
</tr>
<tr>
<td></td>
<td>Trust for charities</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Best Approaches:</th>
<th>Marketing Tips:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Save the world</td>
<td>Concierge-level treatment</td>
</tr>
<tr>
<td>Delayed gratification</td>
<td>Rebates/coupons/discounts</td>
</tr>
<tr>
<td>Remembered for sacrifices</td>
<td>Matching gifts/challenges</td>
</tr>
<tr>
<td>“Immortality”</td>
<td>Print</td>
</tr>
<tr>
<td>Naming using bequests</td>
<td>Families trust them</td>
</tr>
</tbody>
</table>
Post War
1928-1945
PEACE
JAPAN SURRENDERS—ALLIES CEASE FIRE

Piccadilly, caught napping, woke up

Troops had to rescue the police

Today and tomorrow V-days “Enjoy yourselves” call by Attlee at midnight

PETAIN SENTENCED TO DEATH

9 p.m. BROADCAST BY THE KING

Answer to a Riddle

 Emperor to Broadcast

CALOGEN

AFP
Association of Fundraising Professionals
YOU ARE NOW CROSSING 38TH PARALLEL

US COB 728MP

Compliments of RED CHINO
McCarthyism
The Fight for America
by Senator Joe McCarthy
50c
## Post War (1928-1945)

### Defining Moments:
- End of World War II
- Strong economy
- Move to the suburbs
- Cold War/Korean War
- McCarthyism
- Emergence of rock & roll
- Civil rights movement

### Shared Values:
- The American Dream
- Conformity
- Stability
- Family
- Self-fulfillment
- Trust for charities

### Best Approaches:
- Current gifts
- Beneficiary designations
- Gift annuities

### Marketing Tips:
- Volunteer Opportunities (not necessarily tied to gift)
- Active images
- Outcomes-based
Leading Boomers
1946-1954
REV. MARTIN LUTHER KING, JR.
1929 — 1968
"Free at last. Free at last.
Thank God Almighty
I'm Free at last."
## Leading Boomers (1946 to 1954)

<table>
<thead>
<tr>
<th>Defining Moments:</th>
<th>Shared Values:</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Assassinations of JFK, RFK and MLK Jr.</td>
<td>• Personal/social expression</td>
</tr>
<tr>
<td>• Vietnam War</td>
<td>• Individualism protected</td>
</tr>
<tr>
<td>• First man on the Moon</td>
<td>• Youth/health/wellness</td>
</tr>
<tr>
<td></td>
<td>• Lack of trust for charities</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Best Approaches:</th>
<th>Marketing Tips:</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Social justice meets personal planning</td>
<td>• Impact, outcomes and verifiability</td>
</tr>
<tr>
<td>• <em>Restricted gifts</em></td>
<td>• Large type/high contrast/no glossy paper</td>
</tr>
<tr>
<td>• <em>Advisor partnerships</em></td>
<td>• Fun, individualism and excitement</td>
</tr>
<tr>
<td>• Beneficiary designations</td>
<td></td>
</tr>
<tr>
<td>• Complex asset gifts</td>
<td></td>
</tr>
<tr>
<td>• Structured gifts</td>
<td></td>
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</tbody>
</table>
Trailing Boomers
1955-1964
Saigon Surrenders to Vietcong; Withdrawal Ends Role of U.S.
NIXON RESIGNS

HE URGES A TIME OF 'HEALING';
FORD WILL TAKE OFFICE TODAY

'Sacrifice' Is Praised;
Kissinger to Remain

Rise and Fall
Appraisal of Nixon Career

The 37th President
Is First to Quit Post

Speculation Rife
On Vice President

John Ehrlichman, Nixon's chief counselor, was arrested in connection with the Watergate break-in.

The New York Times
SORRY...
out of
gasoline
WILL REOPEN
MONDAY
# Trailing Boomers (1955 to 1964)

<table>
<thead>
<tr>
<th>Defining Moments:</th>
<th>Shared Values:</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Fall of Vietnam</td>
<td>• Lonely individualism</td>
</tr>
<tr>
<td>• Watergate</td>
<td>• Cynicism/distrust</td>
</tr>
<tr>
<td>• Nixon resignation</td>
<td>• Health and wellness</td>
</tr>
<tr>
<td>• Energy crisis</td>
<td>• Family commitments</td>
</tr>
<tr>
<td></td>
<td>• <em>Lack of trust for charities</em></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Best Approaches:</th>
<th>Marketing Tips:</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Gift outcomes</td>
<td>• Impact, outcomes, verifiability and accountability</td>
</tr>
<tr>
<td>• Full range of charitable giving tools</td>
<td>• Conscious of distrust</td>
</tr>
<tr>
<td>• <em>Restricted gifts</em></td>
<td>• Robust stewardship</td>
</tr>
<tr>
<td>• <em>Advisor partnerships</em></td>
<td></td>
</tr>
</tbody>
</table>

*Lonely individualism* refers to a sense of isolation and personal independence.
*Lack of trust for charities* highlights a lack of confidence in non-profit organizations.

Marketing Tips:
- Impact, outcomes, verifiability and accountability
- Conscious of distrust
- Robust stewardship
Generation X
1965-1976
STOCKS PLUNGE 508 POINTS, A DROP OF 22.6%;
604 MILLION VOLUME NEARLY DOUBLES RECORD
STOP AIDS
KEEP THE PROMISE
# Generation X (1965 to 1976)

### Defining Moments:
- Large National Debt/Stock Market Crash of 1987
- Challenger explosion
- Fall of the Berlin Wall
- First Persian Gulf War
- AIDS crisis

### Shared Values:
- Free agency/independence
- Dependence on friends
- Cynical about future
- Street-smart
- Quality of life
- Accept violence/sex
  - *Lack of trust for charities*

### Best Approaches:
- Custom gift solutions
- Beneficiary designations
  - *Restricted gifts (almost exclusively)*
- Advisor partnerships

### Marketing Tips:
- Impact, outcomes, verifiability, accountability and volunteer ops
- Not attractive or rich-facts
- Subtlety/irony/irreverence
Millennials 1977-1984?
On April 20, 1999, in a senseless act of violence, twelve students and one teacher were killed, and many others injured at Columbine High School. It was a tragic event that shook the Columbine and metro Denver communities, horrified and saddened the nation, and changed forever our perceptions of the safety and security within a school typical of so many across America.

Over time, Columbine parents, students, faculty, and community leaders designed and constructed this Columbine Memorial to remember those killed and injured that day and honor their lives. This Memorial is dedicated to those innocent victims, so that they are “never forgotten”.
Dow Jones Industrial Average 2003-2008

Real Estate Boom
## Millennials (1977 to 1984)

### Defining Moments:
- The Internet
- Good economic times
- Columbine High School shootings
- September 11 terrorist attacks
- Wars in Iraq and Afghanistan

### Shared Values:
- Hopeful about financial future
- Heightened fears
- Change is good
- Tolerance/diversity
- *Lack of trust for charities*

### Best Approaches:
- Beneficiary designations
- *Restricted gifts exclusively*
- Modest annual donations focused on mission

### Marketing Tips:
- “Get out of the way”
- Change it up
- Fresh and multi-channel
- Brand conscious loyal
Great Recession
Boomerang
1985-???
What Does this Mean for Campaigns?

• **DO** what you have always done
• **DO NOT** emphasize restricted gifts
• Accept planned gifts
• **Count AND Recognize PGs** at face value using Partnership for Philanthropic Planning standards
PPP Counting and Recognition

- Category A – Outright Gifts
- Category B – Irrevocable Future Gifts
- Category C – Revocable Future Gifts

- You may not want to use Category C for naming
Traditionalists and Planned Gifts for Campaigns

• Always Lead With Mission
• Secure Our Rainy Day Fund
• Gifts to Endow Your Annual Support
• Gifts to Sustain Our Good Work for the Future
• Gifts to Pass on Your Values
Traditionalists and Planned Gifts for Campaigns

- Many of these gifts will be beneficiary designations using:
  - Wills
  - Living Trusts
  - Retirement Plans
  - Payable on Death Accounts
  - Donor-Advised Funds
Traditionalists and Planned Gifts for Campaigns

Because:
- Gifts Cost Nothing Today
- Gifts are Revocable

Top Concerns:
- Outliving Their Resources
- Providing for Their Children and Grandchildren
BUT! Times They Are A Changin’

- Traditionalists
  - 18% of total population
- New Philanthropists
  - 82% of population and growing
New Philanthropists Demand Integration

• Do not trust charities
• Focused on mission
• Long-term goals of the donor/family
• Relationship with the charity, not your needs
• Impact and outcomes (Concierge Stewardship)
Different Approach for New Philanthropists in Campaigns

- Build relationships ahead of time
- Will give to key priorities IF
  - You sell the mission FIRST
  - You make a compelling case
  - You don’t try to force the issue
What Does this Mean for New Philanthropists and Campaigns?

- **DO NOT** what you have always done
- Offer restricted gifts
- Eliminate the “dual” or “triple ask”
- Accept planned gifts
- **Count AND Recognize PGs** at face value using Partnership for Philanthropic Planning standards
- Use a Philanthropic Planning approach for lead donors (top 10%)
Philanthropic Planning Model

Fundraiser + Professional Advisors + Philanthropic Planning

Donor with Charitable Intent = Philanthropy
Philanthropic Planning Model

• Requirements
  • Donor-centered, values-based relational approach
  • Focus on mission and outcomes
  • Investment in each prospect (concierge stewardship)
  • Openness to non-cash assets and restrictions
  • Willingness to collaborate with advisors and include children when requested
Philanthropic Planning Model

• Core Elements
  • Involving the Family
  • Defining Values
  • Exploring Family Wealth
  • Limiting Financial Inheritance
  • Treating the Family as a Business
  • Communicating – Family Meetings
  • Philanthropy
  • Planning
  • Collaboration Among Advisors, Charities and Family
  • Artful Listening
  • Concierge Stewardship
Integration with Capital Campaigns

Stay on Schedule

Campaign Giving for Major Donor

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<tr>
<th>Year</th>
<th>1</th>
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<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>7</th>
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<th>15</th>
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<tr>
<td>Dollars</td>
<td>$20,000</td>
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Quiet Phase: Blue
Public Phase: Green
No Campaign: Purple
Quiet Phase: Blue
Public Phase: Green
Build Your Gift Planning Capacity

- Phase I (80% of the dollars)
  - Beneficiary Designations
- Phase II – Personal Planning Objectives
  - CGAs, CRTs, PIFs
- Phase III – Philanthropic Planning
  - Full Integration for High-Net Worth
    - Complex Assets, CLTs, WRTs
    - Family Wealth Planning Including Advisors
Integration with Annual Fund

• What does the donor want the annual gift to accomplish?

• Different approaches for each cohort
  • Traditionalists – Unrestricted
  • Boomers – Impact, outcomes, verifiability, accountability
  • Gen X – Volunteer opportunities
  • Millennials – “Get out of the way”

• Annual Fund Buckets
Annual Fund donations are a key component of the University's operating budget, particularly in lean economic times. This past fall, in response to donor interest, the University made it possible for Annual Fund donors to direct their gifts to the area of their choosing: the University's areas of greatest need, financial aid, academic and student life, Catholic mission, or global service.

Interestingly, when presented with the choice, over 75 percent of donors still chose to make an unrestricted gift by earmarking their dollars for "areas of greatest need"—demonstrating an enormous amount of trust in the University's ability to use their gifts wisely.

Moving forward, Annual Fund donors and Sorin Society members will continue to be able to direct their gifts to the following priorities:

**AREAS OF GREATEST NEED**

Like any great institution, Notre Dame must be able to respond to critical needs and emerging opportunities; gifts for the "Areas of Greatest Need" permit the University to address such issues. Notre Dame depends on Annual Fund contributions to maintain its financial strength and flexibility from year to year.

**FINANCIAL AID**

Gifts to the Annual Fund provide millions of dollars in assistance for needy students each year. As the economy continues to impact Notre Dame families seeking to pay for their children's college education, the University's financial aid resources are being stretched as never before.

**ACADEMIC AND STUDENT LIFE**

Nowhere else but Notre Dame: a few words that suggest the near-limitless possibilities for intellectual, social, and spiritual growth available to Notre Dame students. From intensely close residential communities to state-of-the-art learning technologies, a Notre Dame education truly is an education of the mind and heart.

**CATHOLIC MISSION**

At the core of Notre Dame's mission is a defining Catholicity that guides our search for truth and inspires students, faculty, and alumni to lead lives of faith, meaning, and service. Guided by Our Lady on the Dome, the University's Catholic character informs all aspects of a Notre Dame education.

**GLOBAL SERVICE**

Among the defining traits of the Notre Dame community is its commitment to serving those in need—a commitment that includes traditional volunteer efforts, as well as innovative service-learning programs and research geared toward improving lives in all corners of the world.

During the remaining 14 months of the *Spirit of Notre Dame* campaign, the University will be asking alumni, parents, and friends to consider supporting the campaign by ramping up their annual giving.

To direct your Annual Fund gift to any one or more of these priority areas, simply visit donate.nd.edu and indicate your preference. If you wish to leave your gift unrestricted, select "Areas of Greatest Need."
Pulling it Together

• Different approaches for New Philanthropists and Traditionalists, even in the same campaign
• For the New Philanthropists
  • Avoid the “combined ask”
  • Focus on mission
  • Engage in support of core priorities which must be tied to the mission
• When the prospect is ready to make a gift use:
  • Philanthropic Planning
  • Capital campaign timing
  • Phase I, II and III gift planning
  • Annual fund buckets
Questions?

Brian M. Sagrestano, JD, CFRE

100 Chestnut Place
New Hartford, NY 13413

P: 315.292.1335 • M: 315.292.2384
brian@giftplanningdevelopment.com

For more on the *Philanthropic Planning Companion*
www.giftplanningdevelopment.com
If you’re interested in more sessions on Planned Giving and Philanthropic Planning you may want to consider attending AFP’s International Fundraising Conference

Philanthropic Planning sessions include:

- Bequest Asks: Getting it Right presented by Stephen Pidgeon
- Ethics of Working with Aging Donors presented by David Madson, ACFRE & Catherine Madison, M.D
- Starting Your Planned Giving Program – the ABCs presented by Timothy D. Logan, ACFRE & Jeffrey Mielke, CFRE

For more information on these and other sessions and to register please visit the conference website: www.afpfc.com
Coming Next….

February 18, 2015
1:00 – 2:30 p.m. ET

Making Each Rung Count: How to Build a Donor Ladder that Goes from Annual Gift to Ultimate Gift

Michael Delzotti, CFRE and Christopher Kasavich, MBA, CFRE

For a listing of the 2015 AFP Webinar Series, please visit our website at www.afpnet.org in the professional development section.
CERTIFICATE OF PARTICIPATION

I was a participant in the AFP Webinar held
January 28, 2015
1:00 – 2:30 PM Eastern

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Presented by:
Brian M. Sagrestano, JD, CFRE

Full participation in this session is applicable for 1.5 points in Category 1.B – Education of the CFRE International application for initial certification and/or recertification.

Signed________________________________________________________

This is for your records only.
Association of Fundraising Professionals

January 28. 2015
Integrating Planned Giving Into Your Campaign/Major Gifts Program

You may use this form to capture your immediate impressions. Please complete the evaluation online by February 4, 2015 at:

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2. CONTENT
3. HANDOUTS
4. AUDIO QUALITY
5. EASE OF REGISTRATION
6. SIMILARITY OF ACTUAL PROGRAM VERSUS ADVERTISED CONTENT
7. VALUE

PRESENTER: OVERALL EFFECTIVENESS
8. Brian M. Sagrestano, JD, CFRE

MY SITE PARTICIPATED AS: A Webconference ☐ An Audioconference ☐

WOULD YOU PARTICIPATE IN ANOTHER VIRTUAL SEMINAR? Yes ☐ No ☐

WHAT WAS YOUR OVERALL IMPRESSION OF THE EVENT AND THE VIRTUAL SEMINAR FORMAT? ANY ADDITIONAL COMMENTS?

NAME (OPTIONAL): ________________________________________________________________

SITE LOCATION: ________________________________________________________________

YOUR FEEDBACK IS IMPORTANT! YOU MAY COMPLETE AN ELECTRONIC EVALUATION AT

https://www.surveymonkey.com/s/FVHGDB7
• **JANUARY 28, 2015, WEDNESDAY**  
  **INTEGRATING PLANNED GIVING INTO YOUR CAMPAIGN/MAJOR GIFTS PROGRAM**  
  BRIAN SAGRESTANO, JD, CFRE

• **FEBRUARY 18, 2015, WEDNESDAY**  
  **MAKING EACH RUNG COUNT: HOW TO BUILD A DONOR LADDER THAT GOES FROM ANNUAL GIFT TO ULTIMATE GIFT**  
  MICHAEL DELZOTTO, CFRE & CHRISTOPHER KASAVICH, MBA, CFRE

• **MARCH 4, 2015, WEDNESDAY**  
  **IS YOUR ORGANIZATION SUSTAINABLE?**  
  SIMONE JOYAX, ACFRE

• **MARCH 17, 2015, TUESDAY**  
  **DONOR RETENTION: CURRENT RATES ARE PLUMMETING! WHAT CAN EVERY FUNDRAISER DO TO REVERSE THE TREND?**  
  JAY LOVE

• **APRIL 14, 2015, TUESDAY**  
  **FUNDRAISING ON A SHOESTRING (FUNDRAISING FOR THOSE WITH NO TIME TO FUNDRAISE)**  
  ALICE FERRIS, ACFRE & JAMES ANDERSON, CFRE

• **APRIL 29, 2015, WEDNESDAY**  
  **FIND HIGH-CAPACITY PROSPECTS HIDING IN PLAIN SIGHT**  
  RACHEL MUIR, CFRE

• **MAY 7, 2015, THURSDAY**  
  **SEVEN SECRETS OF SUCCESSFUL SOLICITATIONS**  
  ANNE MELVIN, J.D.

• **MAY 20, 2015, WEDNESDAY**  
  **ENGAGING YOUR BOARD IN FUNDRAISING FOR THE SMALL SHOP**  
  SANDY REES, CFRE

• **JUNE 3, 2015, WEDNESDAY**  
  **MAKING FRIENDS WITH FINANCIAL STATEMENTS: ACCOUNTING AND BUDGETING CONCEPTS FOR FUNDRAISERS**  
  STEPHANIE CORY, CFRE

• **JUNE 18, 2015, THURSDAY**  
  **WHY AND HOW TO USE SOCIAL MEDIA TO SHOW GRATITUDE TO DONORS**  
  STEVEN SHATTUCK

• **JULY 15, 2015, WEDNESDAY**  
  **TBD**  
  TANIA LITTLE, CFRE

• **AUGUST 12, 2015, WEDNESDAY**  
  **WHAT YOU NEED TO KNOW ABOUT PLANNED GIVING WHEN PLANNED GIVING IS NOT ALL THAT YOU DO**  
  TIMOTHY D. LOGAN, FAHP, ACFRE

• **AUGUST 25, 2015, TUESDAY**  
  **TBD**

• **SEPTEMBER 16, 2015, WEDNESDAY**  
  **IN IT FOR THE LONG HAUL: HOW DONOR RETENTION AND MAJOR GIFTS CAN TRANSFORM YOUR NONPROFIT**  
  JOHN GREENHOO, CFRE

• **SEPTEMBER 29, 2015, TUESDAY**  
  **CREATIVE AND COMPELLING FUNDRAISING MESSAGES FOR DIGITAL SOLICITATIONS**  
  DERRICK FELDMANN

• **OCTOBER 14, 2015, WEDNESDAY**  
  **SOCIAL MEDIA AND ETHICS IN FUNDRAISING**  
  DAVID TINKER, CFRE & LISA CHIOLA, CFRE

• **OCTOBER 28, 2015, WEDNESDAY**  
  **TBD**

• **NOVEMBER 18, 2015, WEDNESDAY**  
  **HOW TO ELEVATE YOUR SMALL SHOP FUNDRAISING PLAN**  
  LIGIA PENA, CFRE

• **DECEMBER 10, 2015, THURSDAY**  
  **MAJOR GIFTS**  
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